

# THE STRATEGIC ORDER TAKER

Learning and Development.  
Be Seen, Be Heard, Be Valued.



Neil John Cunningham

# About the Author

---

## Neil John Cunningham

Founder & Learning and  
Development Solutions Director



With 10 years experience in moving learning from being seen as a nice to have a critical component within a business I wanted to share my ideas on how you can go from order taker, to strategic partner.

The journey involves becoming The Strategic Order Taker. I have laid out the book so that you can follow it as a step by step guide or dive into the parts that you need the most.

I hope you enjoy the book and take away something you can use right away.

Cheers

Neil



A hand is shown writing on a checklist in a notebook. The checklist has several items with checkboxes, including 'Find', 'Make', 'Drive', and 'M...'. The background is a blurred image of a keyboard and a notebook.

# Contents

1	Introduction	Page 4
2	Spotting Patterns	Page 6
3	L&D And Finance	Page 9
4	Be More Like Sales	Page 11
5	Ask for Orders	Page 14
6	Getting Out Of Your Own Way	Page 16
7	Demonstrating ROI and ROL	Page 17
8	Presenting Your Findings	Page 19
9	Good Luck	Page 22
10	Acknowledgements	Page 23



1

# Introduction

## Dispelling The Myth

When I first started working within Learning and Development there was a consensus within the community that the only way to be truly effective, to be taken seriously, to have a seat at the decision-making table was to move from being an order taker to strategic partner.

For a long time I believed this to be true; and I still believe it. Yes we do need to be strategic partners to get a seat at the decision making table, but I also know from a decade of working with teams and individuals that there is a place for order taking and in fact that this is the backbone of becoming a strategic partner.

In a perfect L&D world everyone would get what we do, would understand its value, would naturally reach out to us and ask, "What do you think?" right at the start of every project. This isn't a perfect L&D world and so it's up to us to ask, "How can we get people, teams, and leaders to come to us?". "How do we move the needle from order taker to strategic partner?".

While we are doing this, we should also ask ourselves: "Why do we want to move from order taker to strategic partner?". The answer in my humble opinion is so that we can be seen, be heard and be valued for our contributions.

Over the past decade I have attended workshops, seminars, expo-s and L&D sponsored events where I have been told that the only way to operate is to be at the table, getting my ideas in first and having the rest of the businesses in which I operated to accept them as the gospel truth. The challenge I've found is that at a lot of these events very few people have any answers about how to move from order taker to strategic partner without buying a hugely expensive solution. So, we all sit watching the sales pitch, knowing we cannot afford it and feeling deflated. We don't have the budget and we won't ever have a seat at the decision making table.

They don't offer simple, practical solutions to address the needs of thousands of L&D professionals, which is to show people how to move from being viewed as an order taker to a strategic partner.

That's the need I've seen and wanted to address with this book.

## How did we get here?

There is a place for order taking within L&D, most noticeably within sectors that have a lot of requirements for mandatory regulatory training. This type of training is usually transactional for the L&D team because there are few providers of the specific training. It needs to be completed at regular intervals during the year, and when first looked at as a request; it seems there is no need for L&D to think about the provision of this order.

It works like this:

I need X training by X date otherwise I lose my accreditation and I can't do my job.

For a long time this is how learning was viewed; and still is within the majority of organisations, it seems. Learning / training (whatever your preferred term) was a necessity that got in the way of people doing their jobs. They just needed someone to find a provider, book them in and pass on the details.

It was simple, it worked and it relied on the person who needed the training reaching out to the L&D team (or, more accurately the Training Team, or the Training Admin within the HR team). More importantly L&D didn't need to know the budget, understand financials of the business or be required to think about the order. There was no expectation that L&D would reach out to anyone other than to say "do you need this booking".

For a very long time this was the training teams' value to the business. Keeping an eye on certifications and ensuring everyone had what they needed. We became the order takers through the necessity of the role.

We look down on that kind of interaction now. I believe it's because it is viewed as requiring no skill, needing no input from L&D, and, because it requires no input from L&D it mustn't be worth doing, right?

Well, no, it has a place and is needed, but it's also the basis for how a huge number of businesses and individuals view L&D; and that's what we need to change.

I believe that the answer lies in becoming a strategic order taker. This is a role that is forged by you. It relies on you being proactive, informed and outspoken.

Throughout the rest of this book, I have used my own experience of working in sales, sales training, leading L&D teams and working as freelance consultant to create a set of strategies you can implement today on your journey from order taker to strategic partner.

Be seen, be heard, be valued.

Be "The Strategic Order Taker".